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(54) Title: PROCESSING MANAGEMENT INFORMATION

(57) Abstract:

PROCESSING MANAGEMENT INFORMATION

CROSS-REFERENCE TO RELATED APPLICATIONS

5   This application claims the benefit of United States Provisional

Application Serial No. ____ entitled "PROCESSING MANAGEMENT

INFORMATION" filed on May 7, 1999, which is incorporated herein.

BACKGROUND OF THE INVENTION

10   Reputable authorities have documented industry's difficulty with

successfully implementing either strategic plans or initiatives (e.g.,

reengineering: 2/3 fail; mergers: 57% fall short; IT projects: only 34% are

implemented and take twice as long and twice as much money as

projected). In addition, common frustrations of business executives

15   around today's rapid rate of change can be paraphrased as follows:

"There's so much going on I can't get my arms around

what it all means for improving the way we do business,

and when I get close to a really important strategic

initiative, particularly one affecting multiple aspects of the

20   enterprise, it's usually in trouble."

As a result of today's shortening business cycles and global, dispersed

organizations, a key competitive issue is how quickly an organization

can successfully realign its people around initiatives to change the

25   organization's business model or react to unforeseen circumstances or

opportunities. Existing strategic planning and project management

practices, which are actually or effectively separate processes, do not work quickly or effectively enough for a rapidly changing competitive environment:

- Initiatives are proliferating in virtually every organization at an increasing rate due to technology shifts and, at any one time, are difficult to visualize or interpret strategically.

- Local initiatives are often designed without a clear connection to overall corporate strategic goals and priorities, or with each other, so efforts can end up being at cross purposes or poorly coordinated.

- Strategic thinking is not prevalent in the design of many initiatives which thus tend to perpetuate current practices more than find new ways to grow and prosper.

- Existing management practices are often too informal and undisciplined to stay focused on key priorities or to keep abreast of changing circumstances.

- Projects tend to be managed individually without strategic context so people working on teams do not understand how their actions contribute to the business.

- Managers spend too much time administratively keeping "all the balls in the air" and too little time working proactively on substantive issues driving the business.

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As a consequence of these problems, organizations find it more and

more difficult to meet basic business expectations or to get crucial

change initiatives accomplished. Organizations have difficulty

translating outside events or new ideas into strategic plans and

5   initiatives that get implemented. Today management needs a quick,

cohesive general management process and tools designed for agility in

the 21st century. There are examples of agility and high performance; in

fact organizations across different industries have been held out as

singularly successful and numerous studies have identified specific

10   aspects - leadership, culture, customer relations, quality - that correlate

with high growth and results.

The Web and Internet technology allow far-flung people to be linked

and share information as never before, fostering new alliances and

15   revolutionizing business. However, the tools developed so far are

primarily intended to enable people to communicate at the individual

and team level.

SUMMARY OF THE INVENTION

20   A single cohesive framework can be provided that embodies key

elements for being agile (e.g. organizational development, leadership,

project management, strategic planning) and that uses the Internet to

make these elements readily available. Tools can be provided that help

people understand business goals holistically and work in an integrated

and agile way across the organization to accomplish common or shared

goals. A common framework can be provided for communicating

effectively across diverse groups. A common framework can be

provided for assessing key elements of the business. The framework

5   can also be used to access external sources of knowledge, expertise and

tools.

As used herein, "organization of people" refers to any group of people,

businesses, or other entities that are associated for one or more

10   purposes. Typical organizations of people include a business, an

industry group, a professional organization, a large corporation, a

partnership, a customer allied with a supplier, a university, a division of

a company, a government agency, and a political organization. As used

herein, "management concept" refers to any product of a thought process

15   by a person or other entity that is charged with a responsibility. Typical

management concepts include goals, objectives, initiatives, ideas, plans,

strategies, expectations, assessments, and targets. As used herein,

"pointer" refers to any reference used to direct the attention of a person,

computer program, or other entity. Typical pointers include hypertext

20   links, pull-down menus, index entries, and textual directions.

In one aspect, the invention features a method for use in processing

management information. The method includes acquiring a first set of

computer data representing a model of an organization of people, the

model having fundamental components, the first set of computer data including data items representing the fundamental components; associating the first set of computer data with a second set of computer data representing a portfolio of management concepts; and issuing a

5 report of management concepts based on the second set of computer data, the report being sorted by fundamental component.

In another aspect, the invention features a method for use in processing management information for managing a customer relationship. The

10 method includes acquiring a first set of computer data representing a model of the customer relationship, the model having fundamental components, the first set of computer data including data items representing the fundamental components; associating the first set of computer data with a second set of computer data representing a

15 portfolio of management concepts; and issuing a customer management report of management concepts based on the second set of computer data, the customer management report being sorted by fundamental component.

20 Implementations of this or another aspect of the invention may include one or more of the following features. The fundamental components may include a customer component and at least one of the data items may represent the customer component and may include customer information for the customer relationship. The customer information

may include a description of a customer segment, a customer product,
or a customer service. The fundamental components may include a
process component and at least one of the data items may represent the
process component and may include process information for the

5   customer relationship. The process information may describe a process
to be executed by at least one person to advance the customer
relationship, a process that includes identifying a customer need, a
process that includes identifying an entity that is important to the
customer relationship, a process that includes identifying a possible

10   solution for a customer in the customer relationship, a process that
includes identifying a benefit to a customer in the customer relationship,
a process that includes striving to achieve sole source status with a
customer in the customer relationship, a process that includes striving to
achieve a customer confidant status with a customer in the customer

15   relationship, or a process that includes striving to outperform a
competitor in the customer relationship. The fundamental components
may include a capabilities component and at least one of the data items
may represents the capabilities component and may include capabilities
information for the customer relationship. The capabilities information

20   may describe a capability that is needed for meeting a client
requirement, a capability that includes geographic coverage, a capability
that includes a technical skill, a capability that includes providing a
helpful partner, a capability that includes a relationship management
skill, or a technology that is important to a customer. The fundamental

components may include an economics component and at least one of

the data items may represent the economics component and may

include economics information for the customer relationship. The

economics information may include a description of an economic

5   potential of the customer relationship, a description of a profit and loss

aspect of the customer relationship, or a description of an investments

aspect of the customer relationship.

In another aspect, the invention features a method for use in processing

10   management information for managing a program management office.

The method includes acquiring a first set of computer data representing

a model of the program management office, the model having

fundamental components, the first set of computer data including data

items representing the fundamental components; associating the first set

15   of computer data with a second set of computer data representing a

portfolio of management concepts; and issuing a program management

report of management concepts based on the second set of computer

data, the program management report being sorted by fundamental

component.

20

Implementations of this or another aspect of the invention may include

one or more of the following features. The fundamental components

may include a customer component and at least one of the data items

may represent the customer component and may include customer

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information for the program management office. The customer

information may includes a description of an internal customer, an

external customer, a product, or a service. The fundamental components

may include a process component and at least one of the data items may

5   represent the process component and may include process information

for the program management office. The process information may

describe a process to be executed by at least one person to help meet a

commitment to a customer, a process that includes identifying a

customer need, a process that includes identifying an entity that is

10   important, a prioritization process, a system delivery process, a process

that includes an evaluation process, a process that includes a project

management process, a process that includes performing a cost/benefit

analysis, a process that includes an accountability process, a process that

includes providing metrics, a process that includes providing reporting,

15   a process that includes providing risk management, a process that

includes a staffing process, a process that includes a training process, or

a process that includes a decision making process. The fundamental

components may include a capabilities component and at least one of

the data items may represent the capabilities component and may

20   include capabilities information for the program management office.

The capabilities information may describe a capability that is needed for

meeting a client requirement, a capability that includes business unit

coverage, a capability that includes a technical skill, a capability that

includes providing a helpful partner, a capability that includes a project

management skill, or a capability that includes a technology that is important to a customer. The fundamental components may include an economics component and at least one of the data items may represent the economics component and may include economics information for

5   the project management office. The economics information may include a description of expenses or a description of revenue.

In another aspect, the invention features a method for use in processing management information for managing a scalable process. The method

10   includes acquiring a first set of computer data representing a model of the scalable, the model having fundamental components, the first set of computer data including data items representing the fundamental components; associating the first set of computer data with a second set of computer data representing a portfolio of management concepts; and

15   issuing a scalable process report of management concepts based on the second set of computer data, the scalable process report being sorted by fundamental component.

Implementations of this or another aspect of the invention may include

20   one or more of the following features. The fundamental components may include a customer component and at least one of the data items may represent the customer component and may include customer information for the customer relationship. The customer information includes a description of a customer segment, a description of a

customer product, or a description of a customer service. The

fundamental components may include a process component and at least

one of the data items may represent the process component and may

include process information for the scalable process. The process

5   information may describes a process to be executed by at least one

person to deliver a consistent quality customer service, a process that

includes identifying a customer need, a process that includes identifying

an economic factor, a process that includes developing a scenario, a

process that includes evaluating a competitor, a process that includes

10   identifying a trend, a process that includes pilot testing an option, a

process that includes managing an expectation, a process that includes

assessing a system need, a process that includes assessing an

organizational need, a process that includes assessing a management

practice, a process that includes suggesting an improvement, a process

15   that includes developing a change management process, a process that

includes selling a customer on a change, a process that includes

developing an action plan, or a process that includes maintaining a

relationship. The fundamental components may include a capabilities

component and at least one of the data items may represent the

20   capabilities component and may include capabilities information for the

scalable process. The capabilities information may describe a capability

that is needed for meeting a client requirement, a capability that

includes geographic coverage, a capability that includes a technical skill,

a capability that includes providing a helpful partner, or a capability

that includes a customer management skill. The fundamental components may include an economics component and at least one of the data items may represent the economics component and may include economics information for the scalable process. The economics information may include a description of a profit and loss aspect of the scalable process or a description of an investments aspect of the scalable process.

Other features and advantages will become apparent from the following description, including the drawings, and from the claims.

BRIEF DESCRIPTION OF THE DRAWINGS

Figs. 1-2 and 4 are block diagrams of software systems.

Figs. 3, 6-10, and 12-41 are illustrations of computer display screens produced by the software systems.

Fig. 5 is an illustration of principles underlying the software systems.

Fig. 11 is a spider diagram produced by the software systems.

DETAILED DESCRIPTION

The Agile Management Portal program includes Intranet/Internet based software integrated in a process to help organizations such as companies, enterprises, and businesses, to be more agile. The program allows management teams, wherever located, to quickly plan, design, and work on a common portfolio of strategic goals and initiatives the

teams believe will make the business grow and prosper, and to gain

access to prepopulated external sources of knowledge, expertise and

tools via the Internet.

5   Agility management: In at least some circumstances, Agility means

being able to consistently grow and perform better than competitors in

the marketplace over time, and Agility management means linking

strategic planning, project management, and high performance

organizational principles into an integrated set of management tools,

10   templates and services that enable organizations to be more agile.

The Agile Manager can serve as a "management portal" through which

people can view both internal organizational goals and external

information available to help achieve these goals. The Portal's functional

15   architecture is called The Agile Manager, and has three modules, the

Agile Manager, the Agile Company, the Agile Baseline, and Agile

Know-how, that can be used in a planning and management process:

       The Agile Manager includes:

20   (1)   a business domain structure to which strategic goals and

contributing initiatives can be linked. This structure creates a stem-to-

stern view of how the business works, including customer, value chain,

organization and economic domains. This structure allows the user to

enter and subsequently explore strategic goals and initiatives germane to

either the organization as a whole or to a particular domain. Once the user picks an area of interest, the user is effectively "one click" away from several context sensitive views about investments the organization is making to grow and improve performance.

(2)   a gap analysis facility that a management team can use to assess performance gaps and to design how any aspect of the domain structure would have to change to close these gaps.

(3)   the ability to create a portfolio of strategic goals and their contributing initiatives using either top down brainstorming or bottom-up association techniques. As a result, teams can effectively start with a clean sheet of paper and reinvent the business from scratch. Or the teams can review an inventory of already on-going activities and relate these activities to each other and to overall strategic goals. Having this portfolio available on-line - subject to permissioning controls - for all to see, keeps members of the organization aware of where they need to go, what it will take to get there, and what actions should be taken to stay on track.

(4)   a facility to draw people's attention immediately to changes in the portfolio and its contents that are important to the people in view of their particular roles or interests. This facility gives various. common and individualized views of different goals and initiatives that will help diverse groups of people to work together effectively. A history of these changes and related dates is also maintained.

(5)   a common attribute structure that provides information (e.g., costs, payback, priority, risks, due dates) for any goal and contributing initiative so the goals and initiatives can be sorted against a piece of information to facilitate ongoing decision making. For example, if resources are limited, the user can sort initiatives by cost, payback, and priority, or if the user wants to see how the portfolio will affect any part of the organization, the user can sort by domain.

(6)   the ability to follow a context sensitive link to any goal or initiative and its relevant internal and external sources of knowledge deemed helpful to successful implementation.

(7)   a management action plan/agenda utility that managers can use to keep track of pending issues and actions for each strategic goal or initiative. As a result, users can learn about outstanding issues, upcoming agenda items, and the responsible parties. As a result, items are easily found and a user is allowed to see progress related issues before meetings so that management meetings are focused on substantive issues more time effectively.

The Agile Company:

(8)   The Agile Manager also supports the Agile Company program, which includes content that executives can use to assess how well their organization matches high performance criteria and to suggest base-case template programs that can be adapted to accelerate developing agility. Behind the Agile Company is content reflecting 20 traits and

characteristics that capture fundamental principles underlying agile, high performing organizations

The Agile Baseline:

5 (9) The Agile Baseline includes an accessible assessment tool that displays performance criteria that respondents then evaluate in terms of their organization's competency relative to each criterion. The result of this input is displayed as a "spider" diagram that visually helps to convey the extent of any gaps that should be closed to improve

10 competitiveness. The spider diagram helps people focus on opportunities for improvement and makes the rationale for change readily accessible to members of the organization.

Agile Know-how

15 (10) Agile Know-how includes a subscription service that provides links to specific knowledge sources and tools that can be helpful to people working on different initiatives. This subscription service fits together with the Agile Manager so the knowledge is accessible in the context in which it is needed.

20

When the Agile Manager and its modules are used in conjunction with the Agility Management Process, people are better able to work together in a way demonstrated to be correlated with high performance:

- Fosters a more adaptive culture (e.g., to relish change and fight inertia): linking goals, projects and their attributes and being able to sort the portfolio to focus on a particular aspect facilitates adapting to changes when they occur

5 - Helps align users behind strategic goals and contributing projects: getting users to "see" in simple outline form where the organization wants to go to grow and prosper, and what it's going to take to get there, which enables users to understand the strategy and to keep their own projects in alignment

10 - Helps employees act and be treated like owners: when people can see a model of the organization and understand how it works they are better able to make decisions about what is important, much as if they owned the organization

- Helps makes decisions based on benefits and risks to the
15 business: linking proposed initiatives to the model of the organization, and to costs, paybacks, and priorities makes it easier to understand the benefits and risks that could result.

- Provides well managed structure that encourages teamwork across boundaries: the ability to understand and be informed of
20 changes elsewhere in the organization enhances the ability to work across different disciplines and locations

- Encourages people to continuously look for ways to improve the business: enabling management team members to review a table of contents of their business, and to assess gaps between

how good they need to be and where they are currently, and to set goals for closing these gaps; this ability of individuals or teams to step back and to "see" the table of contents and to reflect on what changes need to be made to different in the marketplace

5 and to improve performance is a key ingredient in creating a culture that continually looks for ways to improve the business

• **Helps people understand better how the pieces of the business work together:** the model of the business gives viewers an integrated view of how the business works and how they relate,

10 which provides a valuable context for understanding why something that does not entirely make sense locally could be proper for the business as a whole

• **Keeps users focused on successfully implementing strategic priorities:** The ability to constantly view and be aware of what is

15 in the approved strategic goals and initiatives portfolio keeps members of the organization aligned around common strategic priorities

• **Makes the management process more cost effective by having information and knowledge available when it is needed:** the

20 linking of plans, goals, resources, people and projects into a relational database accessible via the Internet makes valuable information available almost immediately

The computing environment

To use Agility Manager effectively, an organization may use an intranet

with widespread email and Web browser usage. Agility Manager is

compatible with modern email systems and with Microsoft and

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Netscape Web browsers. Typically, no other client-side software is

required.

Agility Manager combines sophisticated application code with powerful,

10   industry standard server components. The Agility Manager server

includes a database server, a Web application server, and application

code written in server-side Java. Agility Manager can use a Microsoft or

Oracle database server. For example, Agility Manager may be run on an

IBM Websphere application server, or may run on other Java-based

15   application servers. The Agility Manager may run on Windows NT or

Solaris or other operating environments.

Agility Manager may be installed on an internal server, or may be

hosted on a server such as a Web server and connected via Internet or

20   Virtual Private Net.

Example of an on-site installation:

Browsers: MS Internet Explorer 3+, Netscape

Navigator/Communicator 3+

Mailers: Email client with click-through URL linking, such as Notes,

Outlook, Outlook Express, Eudora, Communicator.

Server OS: Windows NT 4

Solaris 2.5+

5   Database Server: MS SQL 6.5

Oracle 8

Database administration capability is typically

required.

Application Server: IBM WebSphere 1.1 or 2.0

10   Web Server: MS IIS, Apache, or Netscape

Mail System: SMTP compatible, such as Notes, Exchange,

Sendmail, Smail, Postoffice.

Example of an off-site installation:

Browsers: MS Internet Explorer 3+, Netscape

15   Navigator/Communicator 3+

Mailers: Email client with click-through URL linking, such as

Notes, Outlook, Outlook Express, Eudora, Communicator.

Integration and source code

20   The Agile Manager is based on a relational data model.

Screen Map for Agile Manager

Fig. 1 is a map of the basic structure of the suite of software that shows

key functions performed by the Agile Manager and ways in which users can get access to other modules of the suite. The sequence of the map illustrates logical paths users take as different aspects of the goal hierarchy are considered, from deciding what belongs and why,

5   designing and modifying goals and contributing projects, monitoring and pursuing issues related to implementation progress, and getting to specific knowledge found helpful to the context of any particular initiative. A screen by screen description is provided below.

10   **Overview of Corporate Processes Affected by the Agility Management Program**

The Agility Management Program helps leaders, managers, and staff conduct normal management practices in everyday corporate life quickly using the power of the Internet and effectively by being able to gain

15   access to knowledge needed to make decisions. Thus, the program helps leaders and managers to both execute daily operations successfully and to continually improve the way they do business to keep abreast of changing competitive conditions and to deliver increasing value to their customers and owners.

20

The Planning/Execution Cycle (Process)

Technology is transforming virtually every aspect of commerce, and globalization and deregulation are making competition more complex. These forces are causing organizations to go through planning and

execution cycles to launch multiple new initiatives to cope. To do this,

organizations routinely make assessments of their performance – they

consider best practices, they survey customer opinions, they examine

market and competitive trends and practices; they create task forces and

5 hire consultants who generate findings and conclusions. To handle

these conclusions, organizations conduct planning to establish goals and

design initiatives to improve their performance – they hold retreats to

develop these visions, they decide on priorities and allocate resources to

fund initiatives to bring these visions to fruition. To execute these

10 initiatives, organizations assign staff and hire outside expertise and

know-how to get the results they want. To get the results to stick,

organizations undertake change management programs to bring people

and organizational behaviors into line with what the new initiatives

require.

15

The Agility Management Program enables people to get organized and

communicate as they go through these planning and execution cycles

much easier and faster because of the enabling software, and to gain

access to knowledge and tools that will help them understand how to

20 implement their initiatives more successfully. Fig. 2 illustrates the

relationship between the Agile Manager and common planning

practices.

Managing a Portfolio of Initiatives

The planning/execution process is repeated again and again across organizations in different departments, functional areas, and lines of business. It is not uncommon for literally hundreds of initiatives to be

5   underway in units across an organization. Some of the initiatives are local initiatives to improve a specific operation and typically do not need to be coordinated with other initiatives. Many initiatives, however, have multiple components that should be coordinated so that they contribute to the accomplishment of a single overarching goal. For

10   instance, a new product requires that processes across the organization from sales and marketing, to operations and manufacturing, and technology as well as human resources be integrated and aligned so that the product will be introduced in time to exploit an opportunity in the marketplace. Similarly, introduction of new technology, such as a new

15   workstation, often requires coordination of units from information technology, sales and marketing, human resource training, and administration before the new technology can be put into beneficial use.

The Agile Manager not only facilitates the planning/execution cycle for

20   any particular goal or initiative, but also allows the user to put all the priority goals and the priority goal's contributing initiatives into a strategic implementation portfolio or hierarchy (Fig 3.).

The portfolio view relates contributing initiatives or projects to their overarching goals and to each other, and allows the user to sort these initiatives, projects, or goals in a variety of ways. For example, the user can sort the initiatives in terms of their impact on the domain structure of the organization, by strategic factors such as cost, payback, and priority, or according to the status and stage the goals and initiatives are in to allow better management.

Helping Leaders, Managers and Staff Play Their Different Roles

People throughout an organization have distinct roles to play in the formulation and implementation of plans. Traditionally, these roles have been substantially formalized, with senior levels likely to do the planning and lower levels likely to do the implementation. Modern email and voice communication have flattened organizational structures by allowing ordinary employees to get access to information on their own without depending on senior levels as the source of knowledge. The Agile Manager allows effectively everyone to see the goals and projects important to the company and, as shown on Fig 4., helps people to play specific roles with a clear picture of the initiatives involved and allows people to contribute ideas.

Overview of How the Software Integrates with a Process in the Agility Management Program

As shown in Fig. 5, the Agility Management Program reflects principles of effective management of high performing organizations.

5

The following describes a typical sequence of how a management user/team might use the Agile Manager. The particular example is drawn from an actual implementation of the Agile Manager linking strategic corporate goals and Information Technology initiatives. The

10 Agile Manager structure allows many different business applications, and a key problem it helps solve is bridging a communication gap between business users and their technical counterparts so both sides work off the same page.

15 **Planning:**

The first sequence, for planning, starts with users viewing their domain structure (Fig. 6) and deciding where they want to set a new goal (see Fig. 7). Users can view the domain structure at different levels of depth from the highest level (shown in Fig. 6) to lower levels showing sub-

20 components within each domain (see Fig. 8). If they wish, users can display already existing goals (see Fig. 9), which helps them to understand what's in the current hierarchy, which can help address issues such as whether particular domains are sufficiently active and whether some existing goals may no longer be appropriate.

Once users have reviewed current activity and debated where the company needs to devote attention to improve future performance, they can select any domain and select an Agile Baseline Mode ("Baseline"). Baseline allows users to critique the selected domain in terms of criteria that The Agile Manager suggests (see Fig. 10), or that they provide or modify themselves. Once the users have agreed on the criteria and reached consensus about both how good the criteria need to be and how good the criteria currently are, the results are displayed in a spider diagram (see Fig. 11). The spider diagram helps to capture the users' assessment of the current situation and to explain why the domain has been selected for developing new goals to be included in the hierarchy. Subsequently, users can return to Baseline to reassess whether improvement goals and projects that have been undertaken have in fact been successful. This reassessment can suggest new gap areas where new initiatives may be appropriate, or indicate that not enough has been accomplished to sufficiently improve the situation.

After exercising Baseline, users may establish a new goal (by a "new goal" button on the domain screens) (see Fig. 7) to improve performance. Once established, the new goal takes its place in the goal hierarchy and management can decide what should happen next.

For example, even if a goal "expand business with the most profitable customers" has been entered, ideas related to the goal have not been

entirely fleshed out, resources have not been allocated, plans have not been formulated, and accountability has not been assigned. The goal is without projects necessary to bring about the desired results. To begin to put these projects together, users can use the gap analysis feature to

5   view each domain and sub-domain in terms of how each domain or sub-domain would have to change if the goal is to be achieved. As users identify these changes, they create in effect a vision of a different company that would achieve the goal (see Fig. 12). In this example, two projects or goals to expand business with profitable customers are: to

10   design relationships with high net worth clients, and to have profitable products for every segment. Each of these two projects or goals may also in turn be analyzed in the gap analysis process to create other projects or goals that will make them a reality.

15   As these projects or goals are defined, they are added to the Goals Hierarchy (see Fig. 3) that provides access to the strategic hierarchy of goals and contributing projects or goals that the company is working on to improve performance. If the user wants to get more information about the new goal or any goal listed in the hierarchy, the user clicks on

20   the goal of interest to get to summary information as shown in Fig. 13.

In summary, the planning sequence allows the user to update company plans either by starting with a clean sheet of paper and brainstorming a new goal and the projects that would bring it about, or by reviewing the

existing hierarchy of goals and projects and deciding whether something is missing. Thus, the hierarchy typically includes a combination of new ideas being considered and maturing goals and projects that are in the process of implementation.

5

Managing the Hierarchy:

The Agile Manager allows managers to keep the hierarchy of goals and contributing goals in constant view and up-to-date with changing circumstances. The hierarchy can be viewed as a totality of goals and

10 contributing goals affecting the enterprise (see Fig. 3), or can be viewed by top goals (see Fig. 14), depending on the user's interest, or by specific top goal (see Fig. 15).

In addition, the user can view the hierarchy against certain types of

15 information that help inform the user about the impact of goals on the business domains (see Fig. 16) or the priority (see Fig. 17) or impact of each of the goals, or about its status, stage of development, or ownership accountability (see Fig. 18). Because these different views are a click away, the Agile Manager supports a dynamic decision making

20 process where discussion can move quickly from strategic to tactical considerations. For example, if the topic is budgets, the user can sort by goal or project cost (see Fig. 19), or by priority or return on investment ("payback") (see Fig. 20) and can be provided with information that can help the user decide where to commit resources based on factors such as

benefit and risk. In another example, when managers meet and want to focus on key implementation issues, they can opt to switch to viewing "status" factors and can view goals or projects by status (e.g., on track or in need of attention) (see Fig. 18), which stage each is in (see Fig. 21),

5   risks, or who is responsible. Without the Agile Manager, each view would likely require a special study or report; the Agile Manager makes these different views available at a moment's notice. In addition, managers who want to explore any goal or project in more detail can click on the goal or project of interest and get more information.

10   Similarly, managers who see something missing while reviewing the overall hierarchy can select "new goal" from the menu and enter a new goal or project (see Fig. 22).

In at least some embodiments, an especially important view managers

15   can use to manage the hierarchy is a view in which the goals and projects are sorted by domain. This view can be produced for any of a number of levels, e.g., for the entire hierarchy (see Fig. 16) or for a selected goal in isolation (see Fig. 23). A purpose of this view is to allow managers to understand quickly what initiatives are underway or

20   will affect an aspect of the business. For instance, if a question arises regarding what is being done about market trends, managers can click on any topic on the domain structure (e.g. customer relationships) (see Fig. 24) and see immediately what initiatives are underway related to this topic (see Fig. 25). Users can also execute searches by name or

word in the title of a goal or project (see Fig. 26), and can put Alerts in

place (see Fig. 27) that will flag changes that occur in goals or projects

previously indicated as being of particular interest (see Fig. 28).

5   **Executing Goals and Projects:**

A major purpose of the Agile Manager, in addition to planning and

managing the overall portfolio of goals and projects (i.e.. the hierarchy),

is to help managers accelerate implementation progress related to a goal

and its contributing projects. A user has an array of choices to view

10   when reviewing the progress of a selected goal. (The choices available

depend on the permission that is granted by the Owner of a Goal to

different types of users (see Fig. 29)).

A "summary" page (see Fig. 13) contains information about the goal

15   itself that can be edited (see Fig. 30). Other main views for helping to

manage include "progress" (see Fig. 31) that displays the contributing

projects or goals that must be finished or achieved before the parent

goal can be fully accomplished. The "progress" view allows managers

to view progress for the contributing projects side-by-side to determine

20   whether the projects are properly synchronized or are out of phase with

each other.

Other features are useful for managers and teams executing goals and

contributing projects. A "discussion" feature (see Fig. 32) allows a user

on the system to communicate directly about, and in the context of, the

goal or project of interest. The owner of a goal can also select a

particularly important part of the discussion and put it on an agenda

(see Fig. 33). Another useful feature includes an ability to link to

5   internal and external sources of information that goal or project teams

believe are important to make accessible to users involved (see Figs. 34

and 35). The links provide a practical application of knowledge

management because the links allow teams to place information

effectively or actually one click away so users can get at the information

10   without excessively disturbing the state of the software. For example,

users can hot-link to and open a detailed Microsoft Project plan if the

plan is useful to the discussions. Users can place Word documents

related to the goal where the documents can be found, and open the

documents when needed. Similarly, users can link to Web sites of

15   outside consultants or suppliers that may be related to the goal at hand.

In this way, users can start using the software through the domain

structure, find out the relevant issues, and access relevant knowledge

context sensitively along the way.

20   The above sections have laid out a description of Agile Manager and the

Agile Baseline module. In addition, the Agile Manager includes the

Agile Company and Agile Know-How modules.

The Agile Company can be added to or made accessible from the Agile Manager and provides a survey that employees can take to assess how well the company or organization is managed in view of high performance criteria. The Agile Company software can be downloaded

5   onto the client's server and a user on the network can complete a questionnaire of multiple pages, such as 20 pages, (exemplified in Fig. 36) and then the software can tabulate results to show strengths and weaknesses (see Fig. 37) for sample analysis. The Agile Company also has templates that can be made available to help clients get started with

10   a change program designed to improve specific high performance traits (exemplified in Fig. 38).

Agile Know-How links users to excerpts of publications about topics relevant to the goals and projects in which they're involved. For

15   instance, the user can stipulate concepts, such as leadership, and specific aspects of the concept, such as senior leadership, and the kind of information needed, such as understanding the concepts, or how to be a good leader, and then get excerpts that match the needed information. In this regard, the Agile Manager enables an organization to use the

20   Agile Manager as a single source for not only information about strategic initiatives but also knowledge available inside and outside the organization that can help make the organization more agile.

The input screen and process flows include:

Goal Hierarchy Screen: this is the default screen (see Fig. 3) and an important navigational screen for accessing details about any single goal or initiative, or accessing various views. Once the goals and

5   contributing projects have been loaded, the default screen presents a goal hierarchy and can be used as follows:

- **Hierarchy:** the left side of the screen presents an outline the top section of which represents the organization's strategic implementation plan, i.e., in which the top level statements

10   represent strategic goals that are the highest level organization goals, and the next indented level statements represent contributing initiatives that are indicated as having to be completed for the strategic goals to be achieved. A user authorized to see the portfolio view can see where the

15   organization wants to go and what it will take to get there, with the goals and projects associated together in one spot.

- **Unassociated Goals:** the goals and initiatives under this heading are indicated as being either no longer relevant strategically or not yet placed in the hierarchy.

20   •   **Functions from this screen:** If a user is unhappy with the placement of a goal or initiative or wants to adjust attributes of the goal or initiative, the user has only to click on a goal or initiative listed to retrieve its related information. For example, a click on the initiative takes the user to a **summary screen** (see Fig.

13) for this initiative. The following information fields are available for any goal or initiative:

- **Heading:** the entry shows the name of the goal or initiative for which basic information is displayed on this screen.

5
- **Owner:** this entry lists the name of the person responsible for implementation of the goal or initiative and authorized to edit its related information.

- **Parent Goal:** this entry lists the name of the goal or initiative immediately above or superior to the initiative that is active. An
10 advantage of showing the parent goal is that a user working on the initiative is instructed that the initiative is contributing to the parent goal.

- **Objective:** this entry shows the objective of the initiative so a user is instructed as to what the initiative is specifically to
15 accomplish.

- **History:** the entry maintains a running log of changes made to the initiative, and indicated by whom and when. Here is recorded when the project was created and when delegated to the current owner. The changes are monitored by the computer so
20 that the user can identify which changes the user wants to have flagged automatically when they are made (see View Alerts below).

- **Status:** this entry identifies the category such as "on-time," chosen to summarize the status of the goal or initiative's progress

so that the user can determine at a glance whether the goal or initiative is in need of attention. The categories listed here can be modified to fit each client situation when an edit mode is selected.

- **Due Date:** this entry indicates the date by which the initiative is to be achieved.

- **Priority:** the benefit entry presents a numerical score from 1 (lowest) to 5 (highest) based on user judgement about the relative value of the initiative or goal in terms of improving the business results. For example, the goal may be rated 3 of 5, i.e., average. An advantage of a simple rating is that users can quickly understand the rating scale and then discuss specifically the reasons behind the rating.

- **Risk:** this field presents a 1 to 5 numerical score that indicates a risk level for the goal or initiative, such as that the team is new, that the technology is untested, or that the market is new. By keeping track of risk, managers can work proactively to reduce risk and thus increase the probability of a successful implementation. In addition, when there are resource constraints, decisions about which initiatives to continue to pursue may depend on a combination of benefit scores and risk scores to indicate how much managers can count on achieving the initiative and having a positive impact on the business. For example, with a priority score of 3 that is lower than a risk score of 4, a question

might be raised about whether to continue to fund the initiative if there are other initiatives that have better benefit/risk characteristics.

- **Project Code:** this field allows an alpha-numeric identifier to be assigned for administrative purposes.

- **Stage:** the stage field shows where in the project life cycle the goal or initiative is so that a user can keep track of how the goal or initiative is progressing and what remains to be done. For example, the initiative shown is in the "start up" stage. In the edit mode, several stages are displayed from which the owner can pick one that is descriptive of the status of the initiative.

- **Investment:** this field captures the cost of or investment in each particular goal or initiative so the user can readily access financial information related to decision making and priorities.

- **Payback:** the payback field refers to the economic return anticipated for achievement of the particular goal or initiative. In conjunction with the investment field, the payback field can allow a ratio of return on investment to be produced, which ratio may play a key decision making role in an assessment of the relative value of one initiative versus another.

- **Rank:** this field is available for formulas developed for each client for calculating the ranking of each goal and initiative, including the combined values of initiatives contributing to a particular strategic goal.

- **Score:** the score field relates to a unique calculation of the cumulative value of each goal and initiative based on weighting techniques appropriate to the user (e.g., alignment with corporate values, brand, payback, competitive position, management attitudes). Both the rank and score fields are provided to help users prioritize goals and initiatives in the portfolio.

- **Edit button:** when a user clicks on the edit button, the user is taken immediately to the **Basic Goal Edit screen** (see Fig. 30) which allows the authorized owner to modify the basic information about the particular goal or initiative that has been selected. The Project Name and Description fields are for text, the Due Date is for calendar completion date information, and the other fields such as domain, status, benefit and risk priority, and stage present pop-up menus. When changes are submitted, the changes are automatically accessible to whomever uses the system and are captured in the history log.

- **Delegate button:** this button allows the user to designate or re-designate the individual who is the owner of the goal or initiative by going to the **Delegate Screen** (see Fig. 36A) and searching through names of candidates to whom responsibility can be delegated.

- **Delete button:** when this button is selected, the user is automatically asked whether the goal or initiative is to be deleted

and, if so, the goal or initiative is deleted and archived in case
subsequent retrieval becomes necessary.

- **Project Menu:** this pop-up menu lists the choices of views the
  user can access from the Basic Goal Info Screen as regards the
  active goal or initiative that has been selected. The view choices
  include the following:

- **Control Panel:** when this choice is made the user is presented
  with the **Control Panel view** (see Fig. 29) and can review the
  permissioning rules. If the rules are satisfactory, the user can
  retreat and proceed along another path. If the rules need to be
  changed, the user clicks the edit button and is presented with
  another version of the **Control Panel** that can be edited and
  submitted. Only the authorized owner is able to make changes.

- **Project Briefing:** if the user wants to understand better how the
  active goal or initiative relates to the parent goal, the user can
  click on this choice and will be presented with the **Project
  Briefing screen** (see Fig. 37). Here salient information is
  displayed from the Objective field in the basic information related
  to the selected goal (see Fig. 38). In addition, sources of
  knowledge that may be helpful to access are listed so that the
  user can hot-link to them if need be. In a typical embodiment,
  this screen cannot be edited and is just a view.

- **Goal Components:** when the user makes this choice, the user is
  presented with a **Goal Components screen** (see Fig. 39) and, in a

typical embodiment, views only the contributing goals that are related to the parent goal. From this screen the user can access different functions including:

- **Select Parent:** when the user wants to change the position of an initiative in the hierarchy, the user clicks on this button and is taken to **the Select New Parent screen** (see Fig. 40). On this screen the user can either search for the new parent goal or initiative if the user knows its name, or click on "Select from Project Hierarchy" and be presented with another screen that lists the hierarchy. The user then selects a goal or initiative as the new parent, and when the user clicks on this selection, the original initiative is associated with the new parent and shows up so associated in the hierarchy.

- **Add SubProject:** when the user wants to add a new subordinate initiative with which the user is working, the user can use the "add" button to view **New Goal screen** (see Fig. 7) and enter information about the new initiative using the standard template. When the information is entered, the new initiative is placed appropriately in the hierarchy.

- **Add Milestone:** this button allows the user to flag and define major milestones in the initiative, which can be useful for adding more detail if appropriate for monitoring significant targets. The **Create Milestone screen** allows the user to name and define the milestone and to set a finish date and status.

- **Project History:** this button takes the user to a display of project history (see Fig. 41) that shows when changes were made, from creation of the initiative to modifications to any of its attributes. This history can be very valuable for tracking key events in the life of a goal or initiative for analytic or other reasons. From this screen the user can also add comments to explain particular events, or add new events.

- **Links:** this button takes the user to a view (see Fig. 35) of the links to any knowledge sources that the initiative team has chosen to put here so that the knowledge sources will be accessible to any members when necessary. An advantage of this facility is that with the domain structure linked to goals and initiatives and with knowledge linked to the goals and initiatives, the organization is provided with a clear and natural organization for placing and locating critical information when needed. From this screen the user can **add links** (see Fig. 34).

- **Gaps Analysis:** this button takes the user to the list of contributing goals/projects (with actual and desired weightings) by domain - screen (see Fig. 13). From this list the user can determine whether the changes for each key domain have been identified. If the user is dissatisfied, the user can either select the edit button and change specific information about one or more of the existing contributing goals/projects or click on "Add" to get to the **Edit Contributing Goal screen** (see Fig. 7). In the latter case,

the user can select a domain and enter the name of a new initiative, its actual achievement weighting (based on current status) and desired achievement weighting (based on the importance of this initiative to achieving the parent goal). When the new initiative idea is submitted, the software displays the Gap Analysis view with the new initiative added. The user can continue to add new contributing goals/projects by domain.

When the user is comfortable that the domains have been covered, the user can click on a listed goal name and proceed directly to its summary screen to begin to flesh out more information about its characteristics such as its owner and objective.

In at least some cases, the value of the Gap Analysis is substantial, because it allows users to brainstorm what changes in the domain structure need to be made if a particular goal or initiative is to be implemented successfully. In this regard, the combination of domain structure and gap analysis keeps members of the organization focused on how the organization works and where improvements need to be made for strategic or tactical reasons.

• **View Menu:** the menu at the top of the Goal Hierarchy screen (see Fig. 42) give the user access to hierarchical views that

facilitate decision making related to creating the hierarchy itself,

reviewing status, or flagging changes particularly interesting to

the user. A description of each of the buttons is set forth in the

following sections:

5   •   **Select Domain:** When this is selected the domain structure

screen is presented (see Fig. 24).

•   **All Goals View:** when this button is clicked, the user is

presented with **screen** (see Fig. 17) which repeats the hierarchy on

the left and adds relevant information on the right in five

10   categories useful to users when the users want to assess the

validity of the current goal hierarchy, including cost, payback

priority, domain, and due date (expressed as time remaining

before expected completion). From this screen, the user can select

other views where the hierarchy is sorted by category represented

15   by the column heading, e.g., is sorted in descending order of

costs, **screen** (see Fig. 17), thereby helping people decide whether

the level of investment required can be afforded. Likewise, using

column headings as buttons, the user can sort the hierarchy into

various views according to **payback** (see Fig. 20), **priority** (see

20   Fig. 20), **domain** (see Fig. 16), **or due date.** These views

facilitate meetings and deliberations where users need to quickly

produce a variety of sorted views to achieve the variety of

perspectives needed to reach informed decisions. For example, a

view sorted by payback, with cost information also visible, helps

users decide whether the return on investment will be sufficient to justify financially.

Sorting by priority allows users to view the relative weightings that have been given to the goals and initiatives based on factors deemed important from a prioritization perspective. In a typical case, from a strategic perspective, the view sort by domain is highly desirable because this view shows how the goals and initiatives affect different aspects of the organization, e.g., from dealing with customers, to processes, organization, and economics. As a result, users can make common sense decisions about, for example, whether all the needed changes in all the domains have been accounted for.

- **Status View:** this button takes the user to various views of the portfolio sorted by information fields that indicate how well the goal or initiative is progressing. When the button is clicked, the **Projects by Status screen** (see Fig. 18) is presented, sorted by status categories and showing other column headings that can be clicked on to get **Projects by Stage** (see Fig. 21) or by **Owner, Projects by Risk, and Projects by Due Date.** Armed with these views, users can decide where to focus their attention to keep projects on track.

- **Alerts View:** this button takes the user to the **Project Alerts View** (see Fig. 27) which shows changes a particular user has identified as being of particular interest. From this view, the user

can access the **Set Alerts** and **Set AlertsEdit** screens and modify

the goals and types of changes the computer is to monitor and

flag on the user's behalf.

5   In a typical embodiment, the Agile Manager is accessible from every

desktop, with appropriate security clearances, for individual or team use

on-line, with print out ability for manual use, and for electronic

projection to facilitate team meetings. The software is flexible and is

arranged to allow the user to make non-structural changes in, for

10   example, the specifics contained. The user changes the "base case" to

reflect the desired language and sub-domain elements. As a result, the

more the tool is used, the more the tool comes to reflect the user and the

user tends to become proficient with the tool.

15   The technique (i.e., at least a portion of one or more of the procedures

described above) may be implemented in hardware or software, or a

combination of both. In some cases, it is advantageous if the method is

implemented in computer programs executing on programmable

computers that each include a processor, a storage medium readable by

20   the processor (including volatile and non-volatile memory and/or

storage elements), at least one input device such as a keyboard, and at

least one output device. Program code is applied to data entered using

the input device to perform the procedure described above and to

generate output information. The output information is applied to one or more output devices.

In some cases, it is advantageous if each program is implemented in a

5   high level procedural or object-oriented programming language such as Microsoft C or C++ to communicate with a computer system. The programs can be implemented in assembly or machine language, if desired. In any case, the language may be a compiled or interpreted language.

10

In some cases, it is advantageous if each such computer program is stored on a storage medium or device (e.g., ROM or magnetic diskette) that is readable by a general or special purpose programmable computer for configuring and operating the computer when the storage medium

15   or device is read by the computer to perform the procedures described in this document. The system may also be considered to be implemented as a computer-readable storage medium, configured with a computer program, where the storage medium so configured causes a computer to operate in a specific and predefined manner.

20

What is claimed is:

Claims

1. A method for use in processing management information,

comprising:

acquiring a first set of computer data representing a model of an

organization of people, the model having fundamental components, the

first set of computer data including data items representing the

fundamental components;

associating the first set of computer data with a second set of

computer data representing a portfolio of management concepts; and

issuing a report of management concepts based on the second set

of computer data, the report being sorted by fundamental component.

2. The method of claim 1, wherein the fundamental components

include an enterprise component and at least one of the data items

represents the enterprise component and describes an operating

environment for the organization of people.

3. The method of claim 2, wherein the at least one of the data

items describes market trends.

4. The method of claim 2, wherein the at least one of the data

items describes a competitor of the organization of people.

5. The method of claim 2, wherein the at least one of the data items describes technology available to the organization of people.

6. The method of claim 1, wherein the fundamental components include an customer component and at least one of the data items represents the customer component and includes customer information for the organization of people.

7. The method of claim 6, wherein the at least one of the data items describes a product to be provided to a customer.

8. The method of claim 6, wherein the at least one of the data items describes a relationship to be maintained between the organization of people and a customer.

9. The method of claim 6, wherein the at least one of the data items describes a service to be provided to a customer.

10. The method of claim 1, wherein the fundamental components include a processes component and at least one of the data items represents the processes component and describes processes to be executed by the organization of people.

11. The method of claim 9, wherein the at least one of the data items describes a manufacturing process.

12. The method of claim 9, wherein the at least one of the data items describes a sales process.

13. The method of claim 9, wherein the at least one of the data items describes a customer service process.

14. The method of claim 9, wherein the at least one of the data items describes a development process.

15. The method of claim 1, wherein the fundamental components include a capabilities component and at least one of the data items represents the capabilities component and describes capabilities of the organization of people.

16. The method of claim 15, wherein the at least one of the data items describes a facility of the organization of people.

17. The method of claim 15, wherein the at least one of the data items describes a person who is a member of the organization of people.

18. The method of claim 15, wherein the at least one of the data items describes a supplier to the organization of people.

19. The method of claim 1, wherein the fundamental components include an economics component and at least one of the data items represents the economics component and includes economic information for the organization of people.

20. The method of claim 1, wherein the management concepts include an idea for improving an aspect of the organization of people and the second set of computer data includes a description of the idea.

21. The method of claim 1, wherein the management concepts include a management initiative for the organization of people and the second set of computer data includes a description of the management initiative.

22. The method of claim 1, wherein the management concepts include a management objective for the organization of people and the second set of computer data includes a description of the management objective.

23. The method of claim 1, wherein the management concepts include a project in the organization of people and the second set of computer data includes a description of the project.

5   24. The method of claim 1, wherein the management concepts include attributes described in the second set of computer data, and the report is sorted by attribute.

25. The method of claim 24, wherein the attributes include a
10   status attribute described in the second set of computer data.

26. The method of claim 24, wherein the attributes include a relative importance attribute described in the second set of computer data.

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27. The method of claim 24, wherein the attributes include a relative importance attribute described in the second set of computer data.

20   28. The method of claim 24, wherein the management concepts are organized hierarchically and the second set of computer data includes a description of the hierarchy.

29. The method of claim 28, wherein achievement of a first of the
management concepts is dependent on achievement of a second of the
management concepts, and the second set of computer data describes a
hierarchical relationship between the first and the second of the

5   management concepts.

30. The method of claim 1, further comprising:

associating a knowledge source with at least one of the
management concepts; and

10   providing a pointer to the knowledge source in the second set of
computer data.

31. The method of claim 1, further comprising:

associating an electronic mail forum with at least one of the

15   management concepts; and

providing a pointer to the electronic mail forum in the second set
of computer data.

32. The method of claim 1, further comprising:

20   formatting the report in accordance with World Wide Web
protocols; and

accepting information via a computer network based on World
Wide Web protocols from a member of the organization of people.

33. The method of claim 1, further comprising:

providing multiple members of the organization of people with substantially simultaneous editing access to the model of the organization of people;

5   receiving, from at least one of the multiple members having editing access, a request for a change to the model of the organization of people; and

substantially instantaneously implementing the requested change by executing a procedure that includes altering at least one of the first

10   and second sets of computer data.

34. The method of claim 1, further comprising:

in the report, indicating that a first of the management concepts is not related to a second of the management concepts;

15   accepting a description of a relationship between the first and second management concepts; and

changing the second set of computer data to reflect the relationship between the first and second management concepts.

20   35. The method of claim 34, wherein the relationship includes a hierarchical relationship in which achievement of the first management concept is dependent on achievement of the second management concept.

36. A data processing system for use in processing management information, comprising:

a computer;

a storage device for storing data on a storage medium;

a first logic circuit configured to acquire a first set of computer data representing a model of an organization of people, the model having fundamental components, the first set of computer data including data items representing the fundamental components;

a second logic circuit configured to associate the first set of computer data with a second set of computer data representing a portfolio of management concepts; and

a third logic circuit configured to issue a report of management concepts based on the second set of computer data, the report being sorted by fundamental component.

37. Computer software, residing on a computer readable medium, for use in processing management information, the computer software comprising instructions for causing a computer to:

acquire a first set of computer data representing a model of an organization of people, the model having fundamental components, the first set of computer data including data items representing the fundamental components;

associate the first set of computer data with a second set of computer data representing a portfolio of management concepts; and

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issue a report of management concepts based on the second set of computer data, the report being sorted by fundamental component.

38. A method for use in processing management information for

5   managing a customer relationship, comprising:

acquiring a first set of computer data representing a model of the customer relationship, the model having fundamental components, the first set of computer data including data items representing the fundamental components;

10   associating the first set of computer data with a second set of computer data representing a portfolio of management concepts; and

issuing a customer management report of management concepts based on the second set of computer data, the customer management report being sorted by fundamental component.

15

39. The method of claim 38, wherein the fundamental components include a customer component and at least one of the data items represents the customer component and includes customer information for the customer relationship.

20

40. The method of claim 39, wherein the customer information includes a description of a customer segment.

41. The method of claim 39, wherein the customer information includes a description of a customer product.

42. The method of claim 39, wherein the customer information
5   includes a description of a customer service.

43. The method of claim 39, wherein the fundamental components include a process component and at least one of the data items represents the process component and includes process
10   information for the customer relationship.

44. The method of claim 43, wherein the process information describes a process to be executed by at least one person to advance the customer relationship.
15

45. The method of claim 43, wherein the process information describes a process that includes identifying a customer need.

46. The method of claim 43, wherein the process information
20   describes a process that includes identifying an entity that is important to the customer relationship.

47. The method of claim 43, wherein the process information describes a process that includes identifying a possible solution for a customer in the customer relationship.

5   48. The method of claim 43, wherein the process information describes a process that includes identifying a benefit to a customer in the customer relationship.

49. The method of claim 43, wherein the process information
10   describes a process that includes striving to achieve sole source status with a customer in the customer relationship.

50. The method of claim 43, wherein the process information describes a process that includes striving to achieve a customer
15   confidant status with a customer in the customer relationship.

51. The method of claim 43, wherein the process information describes a process that includes striving to outperform a competitor in the customer relationship.

20

52. The method of claim 38, wherein the fundamental components include a capabilities component and at least one of the data items represents the capabilities component and includes capabilities information for the customer relationship.

53. The method of claim 52, wherein the capabilities information describes a capability that is needed for meeting a client requirement.

54. The method of claim 52, wherein the capabilities information describes a capability that includes geographic coverage.

55. The method of claim 52, wherein the capabilities information describes a capability that includes a technical skill.

56. The method of claim 52, wherein the capabilities information describes a capability that includes providing a helpful partner.

57. The method of claim 52, wherein the capabilities information describes a capability that includes a relationship management skill.

58. The method of claim 52, wherein the capabilities information describes a capability that includes a technology that is important to a customer.

59. The method of claim 38, wherein the fundamental components include an economics component and at least one of the data items represents the economics component and includes economics information for the customer relationship.

60. The method of claim 59, wherein the economics information includes a description of an economic potential of the customer relationship.

5   61. The method of claim 59, wherein the economics information includes a description of a profit and loss aspect of the customer relationship.

10   62. The method of claim 59, wherein the economics information includes a description of an investments aspect of the customer relationship.

63. A method for use in processing management information for managing a program management office, comprising:

15   acquiring a first set of computer data representing a model of the program management office, the model having fundamental components, the first set of computer data including data items representing the fundamental components;

associating the first set of computer data with a second set of
20   computer data representing a portfolio of management concepts; and

issuing a program management report of management concepts based on the second set of computer data, the program management report being sorted by fundamental component.

64. The method of claim 63, wherein the fundamental components include a customer component and at least one of the data items represents the customer component and includes customer information for the program management office.

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65. The method of claim 64, wherein the customer information includes a description of an internal customer.

66. The method of claim 64, wherein the customer information
10 includes a description of an external customer.

67. The method of claim 64, wherein the customer information includes a description of a product.

15   68. The method of claim 64, wherein the customer information includes a description of a service.

69. The method of claim 63, wherein the fundamental components include a process component and at least one of the data
20 items represents the process component and includes process information for the program management office.

70. The method of claim 69, wherein the process information describes a process to be executed by at least one person to help meet a commitment to a customer.

5   71. The method of claim 69, wherein the process information describes a process that includes identifying a customer need.

72. The method of claim 69, wherein the process information describes a process that includes identifying an entity that is important.

10

73. The method of claim 69, wherein the process information describes a process that includes a prioritization process.

74. The method of claim 69, wherein the process information

15   describes a process that includes a system delivery process.

75. The method of claim 69, wherein the process information describes a process that includes an evaluation process.

20   76. The method of claim 69, wherein the process information describes a process that includes a project management process.

77. The method of claim 69, wherein the process information describes a process that includes performing a cost/benefit analysis.

78. The method of claim 69, wherein the process information describes a process that includes an accountability process.

79. The method of claim 69, wherein the process information
5 describes a process that includes providing metrics.

80. The method of claim 69, wherein the process information describes a process that includes providing reporting.

10 81. The method of claim 69, wherein the process information describes a process that includes providing risk management.

82. The method of claim 69, wherein the process information describes a process that includes a staffing process.

15
83. The method of claim 69, wherein the process information describes a process that includes a training process.

84. The method of claim 69, wherein the process information
20 describes a process that includes a decision making process.

85. The method of claim 63, wherein the fundamental components include a capabilities component and at least one of the

data items represents the capabilities component and includes capabilities information for the program management office.

86. The method of claim 85, wherein the capabilities information describes a capability that is needed for meeting a client requirement.

87. The method of claim 85, wherein the capabilities information describes a capability that includes business unit coverage.

88. The method of claim 85, wherein the capabilities information describes a capability that includes a technical skill.

89. The method of claim 85, wherein the capabilities information describes a capability that includes providing a helpful partner.

90. The method of claim 85, wherein the capabilities information describes a capability that includes a project management skill.

91. The method of claim 85, wherein the capabilities information describes a capability that includes a technology that is important to a customer.

92. The method of claim 63, wherein the fundamental components include an economics component and at least one of the

data items represents the economics component and includes economics
information for the project management office.

93. The method of claim 92, wherein the economics information
includes a description of expenses.

94. The method of claim 92, wherein the economics information
includes a description of revenue.

95. A method for use in processing management information for
managing a scalable process, comprising:

acquiring a first set of computer data representing a model of the
scalable, the model having fundamental components, the first set of
computer data including data items representing the fundamental
components;

associating the first set of computer data with a second set of
computer data representing a portfolio of management concepts; and

issuing a scalable process report of management concepts based
on the second set of computer data, the scalable process report being
sorted by fundamental component.

96. The method of claim 95, wherein the fundamental
components include a customer component and at least one of the data

items represents the customer component and includes customer

information for the customer relationship.

97. The method of claim 96, wherein the customer information

5   includes a description of a customer segment.

98. The method of claim 96, wherein the customer information

includes a description of a customer product.

10   99. The method of claim 96, wherein the customer information

includes a description of a customer service.

100. The method of claim 95, wherein the fundamental

components include a process component and at least one of the data

15   items represents the process component and includes process

information for the scalable process.

101. The method of claim 100, wherein the process information

describes a process to be executed by at least one person to deliver a

20   consistent quality customer service.

102. The method of claim 100, wherein the process information

describes a process that includes identifying a customer need.

103. The method of claim 100, wherein the process information describes a process that includes identifying an economic factor.

104. The method of claim 100, wherein the process information describes a process that includes developing a scenario.

105. The method of claim 100, wherein the process information describes a process that includes evaluating a competitor.

106. The method of claim 100, wherein the process information describes a process that includes identifying a trend.

107. The method of claim 100, wherein the process information describes a process that includes pilot testing an option.

108. The method of claim 100, wherein the process information describes a process that includes managing an expectation.

109. The method of claim 100, wherein the process information describes a process that includes assessing a system need.

110. The method of claim 100, wherein the process information describes a process that includes assessing an organizational need.

111. The method of claim 100, wherein the process information describes a process that includes assessing a management practice.

112. The method of claim 100, wherein the process information

5 describes a process that includes suggesting an improvement.

113. The method of claim 100, wherein the process information describes a process that includes developing a change management process.

10

114. The method of claim 100, wherein the process information describes a process that includes selling a customer on a change.

115. The method of claim 100, wherein the process information

15 describes a process that includes developing an action plan.

116. The method of claim 100, wherein the process information describes a process that includes maintaining a relationship.

20   117. The method of claim 95, wherein the fundamental components include a capabilities component and at least one of the data items represents the capabilities component and includes capabilities information for the scalable process.

118. The method of claim 117, wherein the capabilities information describes a capability that is needed for meeting a client requirement.

5   119. The method of claim 117, wherein the capabilities information describes a capability that includes geographic coverage.

120. The method of claim 117, wherein the capabilities information describes a capability that includes a technical skill.

10   121. The method of claim 117, wherein the capabilities information describes a capability that includes providing a helpful partner.

15   122. The method of claim 117, wherein the capabilities information describes a capability that includes a customer management skill.

123. The method of claim 95, wherein the fundamental

20   components include an economics component and at least one of the data items represents the economics component and includes economics information for the scalable process.

124. The method of claim 123, wherein the economics information includes a description of a profit and loss aspect of the scalable process.

5   125. The method of claim 123, wherein the economics information includes a description of an investments aspect of the scalable process.

The Agile Manager
Goal hierarchy

List of strategic implementation plan, and unassociated goals

Alerts

Shows the user any changes that have occurred in goals and projects they want to follow

Status

Allows user to see goals and projects associated with owner, risk, status stage and due date

Goal

Allows user to see goals and projects associated with domains, costs, payback, priority and due date

Agile Know-how

Allows user to access customized knowledge, inside or outside, in the context of goals and projects

The Agile Baseline

Allows user to evaluate adequacy of aspects of the business against performance criteria

Plan

Allows user to assess aspects of the business, to do gap analysis and to create new goals and projects

The Agile Company

Allows user to evaluate practices against the 20 high performance traits and projects

FIG. 1

FIG. 2

Agile Manager I Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_hierarchy.jsp?null

Goals	△ Plan	△ Administor

Hierarchy ▼

Back

Associated Goals

Archieve a 20% ROI
  Revisit our product pricing strategy
  Reduce our AR to under 60 days
  Build a sales forcsting capability
Expand business with most profitable customers
  Deepen relationships with high net worth clients
  Have profitable prodcuts for every segment
Implement highly scaleable and efficient processes
  Build a RFP/Proposal response capability
  Reduce product development cycle by 6 months
  Develop a web-based customer self service strategy
    Build an Internet savvy design and install team
    Implement self service account maintenance
    Select an E-commerce consulting firm
      Develop an RFP for professional services support
      Perform reference checks on short list of PS firms
      Perform xyz
    Implement self service technical help desk

internet strategy 1:
  provide global information
  establish business in new market
  build something

Document Done

FIG. 3

Senior
executives
- Set direction
- Prioritize investments
- Improve performance

Managers
- Focus on strategic issues
- Manage initiatives
- Lead successful change

**The Agility
Management
Program**

The Agile Manager
The Agile Company
The Agile Baseline
Agile Know-how

Teams
- Create innovative solutions
- Coordinate work
- Achieve business benefits

Individuals
- Think like owners
- Link to corporate goals
- Grow and succeed
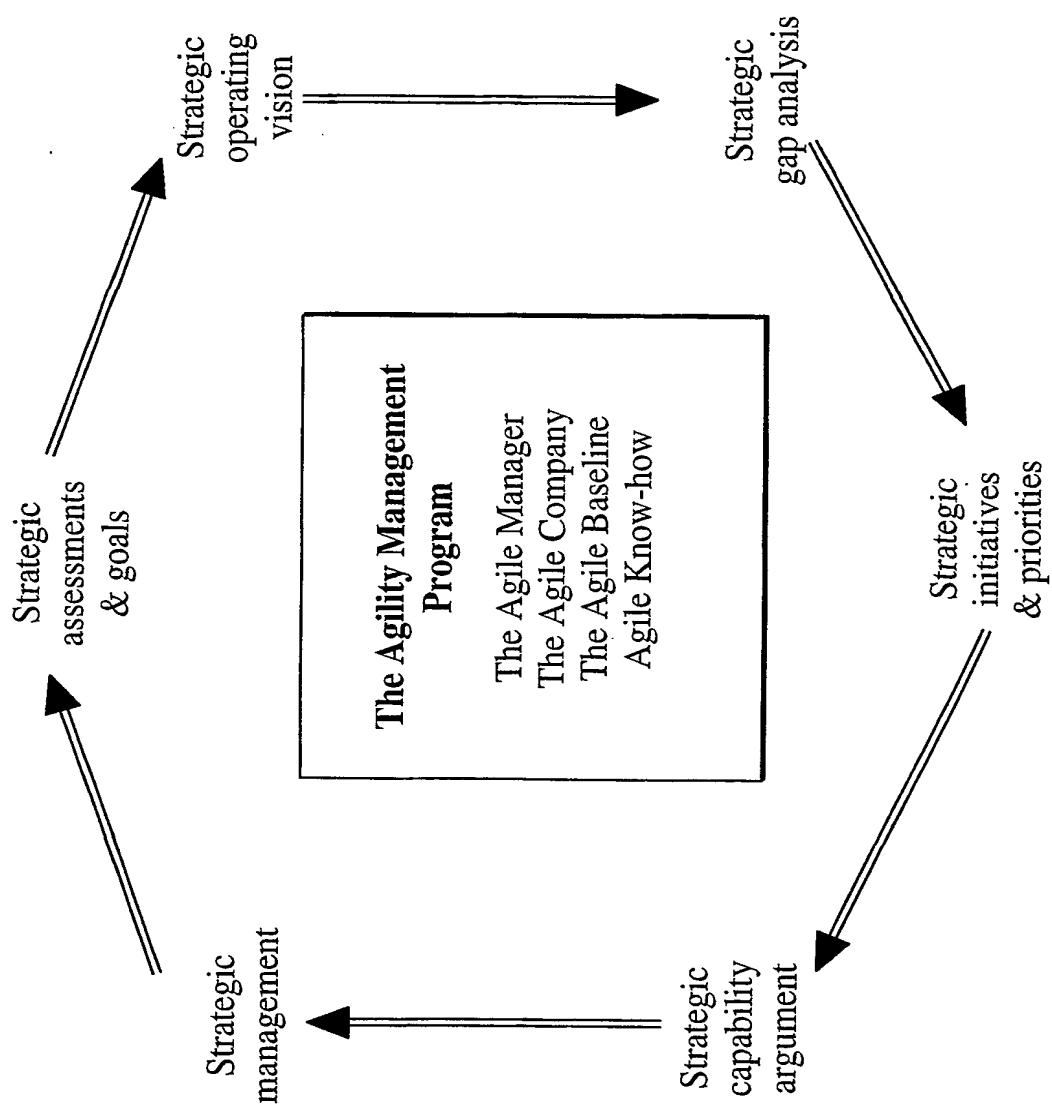
FIG. 4

Research based *Diagnostics* reduce
organizational barriers

Management Team

- Focusing on the highest gain strategic initiatives:
  - creating a portfolio of high leverage initiatives
  - reprioritizing the portfolio as things change
  - reviewing new/old initiatives for ROI impact
- Reducing organizational barriers to sucess:
  - determining factors critical for sucess
  - identifying key risks to be manaaged proactively
  - making adjustments to eleiminate key barriers
- Applying management talent on the right things:
  - reinforcing strategic goals using structured communication
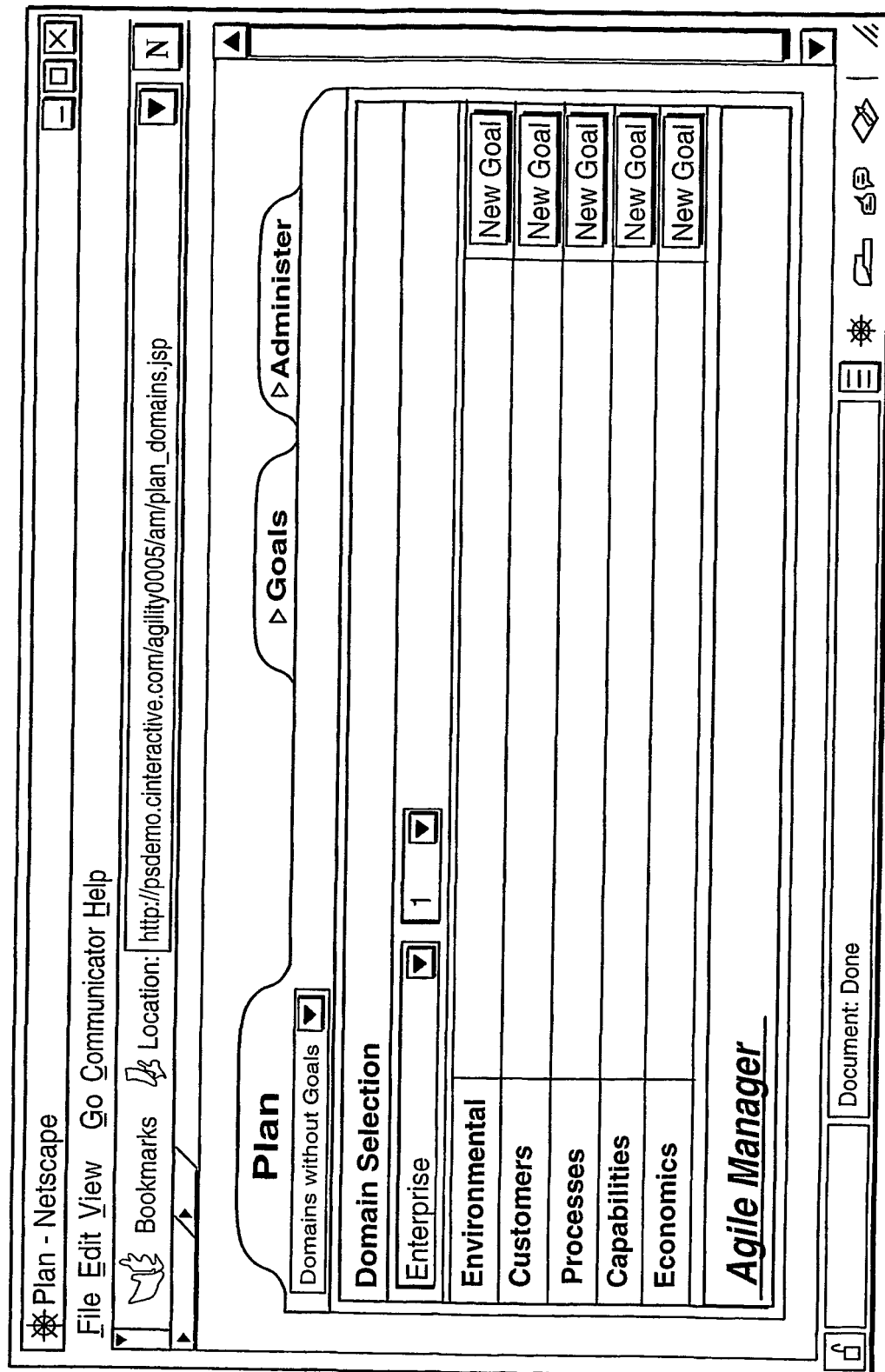 - getting substance from management meetings
  - focusing management attention on the high leverage items
- Equipping leaders to succeed:
  - learning to think like owners
  - getting the most from interdisciplinary teams
  - managing project risk to value

Enterprise

- "Hard-wired" to customer needs/behaviors
- Infectious, improvement-driven leadership
- Visionary leadership with crystal clear communication
- Employees act like/treated like owners
- Action focused innovation/risk taking rewarded
- Value based decision making at lowest level
- Adaptive culture, revolutionary when necessary
- Driven to excel; "good enough never is"
- Relentless commitment to lower cost and higher quality
- Boundaryless, by well managed structures
- Time/resources focus on high value initiatives
- Systematic, opportunistic strategies that adapt
- Concentrate where the business leverage is
- Exacting execution with reliable results
- Information/knowledege accessible as needed

Agility
MANAGEMENT PARTNERS

FIG. 5

Plan - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp

Plan

△ Goals △ Administer

Domains without Goals ▶

Domain Selection

Enterprise ▶ 1 ▶

	New Goal
Environmental	New Goal
Customers	New Goal
Processes	New Goal
Capabilities	New Goal
Economics	

Agile Manager

Document: Done

FIG. 6

Add a Contributing Goal [□ Cancel]

New Goal [□ Submit]

Goal Name
New Goal

Goal Objective

Domain: [None] ▼

Status: not started ▼

Priority: 5 ▼

Risk: 5 ▼

Stage: [None] ▼

Due Date: 12/31/99

Investment:

Return:

[□ Submit]

**Agile Manager** [□ Cancel]

Document Done

FIG. 7

Plan

Domains without Goals ▶

△ Goals

△ Administor

Domain Selection

Enterprise ▶   Depth ▶

Environmental	New Goal
Market Trends	New Goal
Competitors	New Goal
Technical Innovation	New Goal
Regulatory	New Goal
Customers	New Goal
Relationships	New Goal
Products	New Goal
Services	New Goal
Processes	New Goal
Core Processes	New Goal
Business Acquisition	New Goal
Business Development	New Goal
Product Development	New Goal

FIG. 8

FIG. 9

FIG.10

Values

Title | Business development assesment

Subtitle | current situation vs. desired state

─Animation─
Spin Rate | 84
Increment | 3

Top Value | Number of
7 | 6

Show Average
1 points

Average	Value	Label
5	3	business people vs. just sales people
6.5	2.5	sell solutions not just products
7	4	customer vs. internally focused
6	3.5	business makers vs. order takers
5	4	profitability vs. sales focused
6	4.5	deal well at senior vs. just technical level
5.5	4	world class vs. unacceptable service
7	3	build value based client relationships
0	0	
0		

OK

Cancel

Clear

Business development assessment
current situation vs. desired state

FIG. 11

| ※ Agile Manager I Act I Gap Analysis - Netscape | ▢◻▢☒ |

Bookmarks 📝 Location: /act_gaps.jsp?domain=&depth=depth&proj=PSCDB565336755E10072391DBEA017F ▼ N

| **Act** | ▷**Goals** | ▷**Plan** | ▷ **Administer** |

Gap Analysis ▼

Expand business with most profitable customers

Cross sell and up sell our products to our existing client base from a position of strength.

Enterprise ▼ Depth▼

Domain	**Contributing Goal**	**Actual/ Desired**	**Gap**	Add
Environmental				Add
Market Trends				Add
Competitors				Add
Technical Innovation				Add
Regulatory				Add
Customers				Add
Relationships	Deepen relationships with high net worth clients	10/10	0	Add
Products	Have profitable products for every segment	6/10	4	Add
Services				Add
Processes				Add
Core Processes				Add
Product Development				Add

Document Done 目※ 🗁 📙 ◈l

FIG. 12

Expand business with most profitable customers I Summary - Netscape ⬚□⊠

File Edit View   Go Communicator Help

Bookmarks   Location: /agility0005/am/act_summary.jsp?proj=PSCDB565336755E10072391DBEA017F30 ▼   N

| **Act** | ▷**Goals** | ▷**Plan** | ▷ **Administer** |

Summary ▼

Expand business with most profitable customers   ⬚ Delete   Edit

Parent Goal: Select Parent

Owner: Doug Beaven   Delegate

Objective
Cross sell and up sell our products to our
existing client base from a position of
strength.

History
(04/14/99) SubProject - Added subproject:
Identify clinets with the greatest $ opportunity.
(04/14/99) SubProject - Added subproject: Have
profitable products for every segment.
(04/13/99) Date - Target date changed to 09/01/99.

(04/13/99) Create - Project created.

Domain: Customers
Status: Onot started
Due Date: 09/01/99
Actual Goal:
Desired Goal:
Gap:
Priority: 5
Risk: 3
Stage: Analysis/Assessment
Investment: $125,000.00
Payback: $16,750,000.00

Agile Manager   Edit

Document Done

FIG. 13

● ●

FIG. 14

The browser window shown in the figure contains:

Agile Manager | Hierarchy Listings - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp

△ Plan △ Administer

Goals

Top Goals

Top Goals

Select Top Goal by clicking to see all of its contributing goals.

Achieve a 20% ROI

Expand business with most profitable customers

Implement highly scaleable and efficient processes

internet strategy 1:

Leverage our core competencies

Monitor competitive moves around the Internet

Back

Back

Agile Manager

Document: Done

Goals

[Select] ▶

△ Plan   △ Administor

View Contributing Goals   *Show Columns for:* Priority ▶

Expand business with most profitable customers

	Cost	Payback	Priority	Due
Deepen relationships with high net worth clients	750,000	5,000,000	5	5w
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:	$825,000.00	$5,250,000.00		

Agile Manager

FIG. 15

| Agile Manager | Hierarchy Listing - Netscape | □ ◻ ⊠ |

File Edit View   Go Communicator Help

Bookmarks   Location: http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp   ▼ | N

Goals   ▷ **Plan**   ▷ **Administor**

[Select] ▼

View All Goals   *show Columns for:* | Domain ▼ |

	Cost	Payback	Priority	Due
Environmental				
New Goal	-	-	5	-
Competitors				
Find new company or spin off threats	5,000	50,000	5	10w
Monitor competitive moves around the Internet	5,000	50,000	3	8w
Technical Innovation				
new internet strategy	-	-	5	-
Customers				
Expand business with most profitable customers	125,000	16,750,000	5	17w
Increase visibility	-	-	5	-
Relationships				
Ask clients about our perceived competencies	10,000	500,000	5	1w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Understand recent competitive wins	1,000	10,000	5	4w
Products				
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	3	21w
Revisit our product pricing strategy	20,000	1,500,000	5	6w
Services				
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w

| Document Done

FIG. 16

Agile Manager | Hierarchy Listing - Netscape ⊟□⊠

File Edit View   Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp ▼ N

Goals   ▷ **Plan**   ▷ **Administor**

[Select] ▼

View All Goals   *Show Columns for:* Priority ▼

	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Impement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

Document Done

FIG. 17

Agile Manager I Hierarchy Listing - Netscape   ⊟⊡☒

File Edit View   Go Communicator Help

Bookmarks   Location: | http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp | ▼ | N

Goals   ▷ Plan   ▷ Administor

[Select] ▼

View All Goals   Show Columns for: | Status ▼

	Risk	Owner	Stage	Status	Due
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
⊘ Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
⊘ Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
⊘ Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
○ Increase out technology R&D capability	5	Joe Smith	Prototype	not started	34w
○ Increase visibility	5	chris curran	-	not started	-
○ New Goal	5	Doug Beaven	-	not started	-
○ Perform xyz	5	Doug Beaven	-	not started	-
⊘ Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
◉ Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
⊘ Understand recent competive wins	5	Mike Jones	Analysis/Assessment	on track	4w
⊘ increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
○ internet strategy 1:	5	Doug Beaven	-	not started	-

Document Done   ⊟ ☀ ⊡ ⬦ ◈ |

FIG. 18

Agile Manager I Hierarchy Listing - Netscape	⊟◻⊠

File Edit View   Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp ▼ N

Goals   ▷ **Plan**   ▷ **Administor**

[Select] ▼

View All Goals   *Show Columns for:* Priority ▼

	Cost	Payback	Priority	Due
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
increase auto adjudication rates	1,000,000	1,250,000	5	86w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Implement highly scaleable and efficient processes	450,000	1,250,000	5	30w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Develop an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Implement GSTP by yearend	150,000	10,000,000	5	34w
Expand business with most profitable customers	125,000	16,750,000	5	17w
Implement self service technical help desk	85,000	100,000	4	6w
Build a RFP/Proposal response capability	75,000	100,000	4	8w
Have profitable products for every segment	75,000	250,000	5	34w
Implement self service account maintenance	65,000	2,000,000	4	1w
Resell our back office processing capabilities	50,000	250,000	3	21w
Build a sales forecasting capability	35,000	100,000	4	12w
Revisit our product pricing strategy	20,000	1,500,000	5	6w

Document Done

FIG. 19

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┌──────────────────────────────────────────────────────────────────────────────┐
│ ✻ Agile Manager I Hierarchy Listing - Netscape                      [_][□][✕] │
│ File Edit View   Go Communicator Help                                          │
│ ✎ Bookmarks ✐ Location: http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp  ▼  N │
└──────────────────────────────────────────────────────────────────────────────┘
```

| Goals | ▷ Plan | ▷ Administor |

[Select] ▼

View All Goals

Show Columns for: Priority ▼

	Cost	Payback	Priority	Due
Expand business with most profitable customers	125,000	16,750,000	45	17w
implement GSTP by yearend	150,000	10,000,000	5	34w
Build an Internet savvy design and install team	1,000,000	5,000,000	4	-5w
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Develop a web-based customer self service strategy	450,000	2,800,000	4	21w
Reduce Breakeven on New Business	10,000	2,500,000	4	8w
Implement self service account maintenance	65,000	2,000,000	4	1w
Increase our technology R&D capability	555,555	2,000,000	5	34w
Revisit our product pricing stategy	20,000	1,500,000	5	6w
Achieve a 20% ROI	250,000	1,250,000	5	34w
Implement highly scalable and efficient processes	450,000	1,250,000	5	30w
Increase auto adjudication rates	1,000,000	1,250,000	5	86w
Develope an RFP for professional services support	250,000	1,000,000	5	-3w
Recruit and hire world class industry talent	250,000	1,000,000	5	34w
Select an E-commerce consulting firm	300,000	1,000,000	4	4w
Ask clients about our perceived competencies	10,000	500,000	5	1w
Reduce product development cycle by 6 months	250,000	500,000	4	17w
Have profitable products for every segment	75,000	250,000	5	34w
Resell our back office processing capabilities	50,000	250,000	4	21w
Reduce our AR to under 60 days	5,000	150,000	5	8w

Document Done

FIG. 20

Goals

[Select] ▼

△ Plan   △ Administor

View All Goals

Show Columns for: Status ▼

	Risk	Owner	Stage	Status	Due
⊘ Have profitable products for every segment	4	Mike Jones	Requirements Gathering	needs atttention	33w
⊘ Monitor competitive moves around the Internet	3	Doug Beaven	Analysis/Assessment	needs attention	7w
⊛ Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
⊛ Develop an RFP for professional services support	4	Joe Smith	Retrospective	completed	-4w
⊛ Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective	completed	-4w
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○ Eclipse competition with our e-comm capability	5	Doug Beaven	—	not started	—
○ Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w

FIG. 21

Goals

[Select] ▼

[Select]
Hierarchy
Select Domain
Top Goals
All Goals
Alerts
Search
New Goal

▷ Plan   ▷ Administor

Show Columns for: Status ▶

	Risk	Owner	Stage	Status	Due
...ducts for ...ve moves around the Internet	4	Mike Jones	Requirements Gathering	needs attention	33w
	5	Doug Beaven	Analysis/Assessment	needs attention	7w
⊘ Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w
◉ Develop an RFP for professional services support	4	Joe Smith	Retrospective Review	completed	-4w
◉ Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective Review	completed	-4w
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d
○ Eclipse competition with our e-comm capability	5	Doug Beaven	—	not started	—
○ Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w
○ Find new company or spin off	5	Doug Beaven	Implement	not started	9w
○ Increase our technology R&D threats	5	Joe Smith	Prototype	not started	33w

FIG. 22